



OWNER'S PROJECT
MANAGEMENT SERVICES
FORT RIVER AND
WILDWOOD ELEMENTARY
SCHOOLS

TOWN OF AMHERST AND ARPS

APRIL 27, 2021



INTRODUCING ANSER ADVISORY

A background image of a school building in winter, with snow on the ground and bare trees. The image is split into two panels: the left panel is teal and contains the "STRONG BENCH STRENGTH" header and a list of four bullet points; the right panel is light blue and contains the "LOCAL EXPERTISE" header and a list of four bullet points.

STRONG BENCH STRENGTH

- ✓ 400+ Employees Nationwide
- ✓ Ranked at #15 on ENR's 2020 Top 50 Program Management Firms
- ✓ Focused solely on advising and managing capital projects for owners
- ✓ Strong Financial stability and capacity to support the contract

LOCAL EXPERTISE

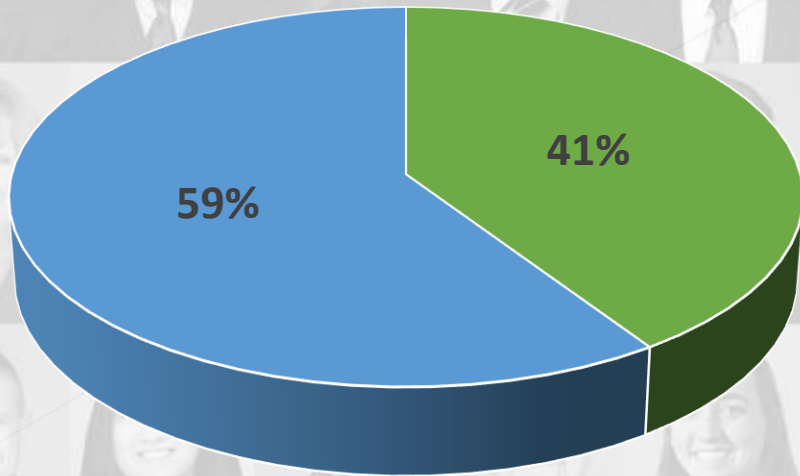
- ✓ Over 22 years providing owner's project management services to public and non-profit clients in Massachusetts
- ✓ 28 local staff members
- ✓ Extensive experience with both public and private elementary schools, including Districts with Regional agreements
- ✓ Proven track record of building on occupied sites

We are strategic
thinkers and
complex problem
solvers.

INTRODUCING ANSER ADVISORY



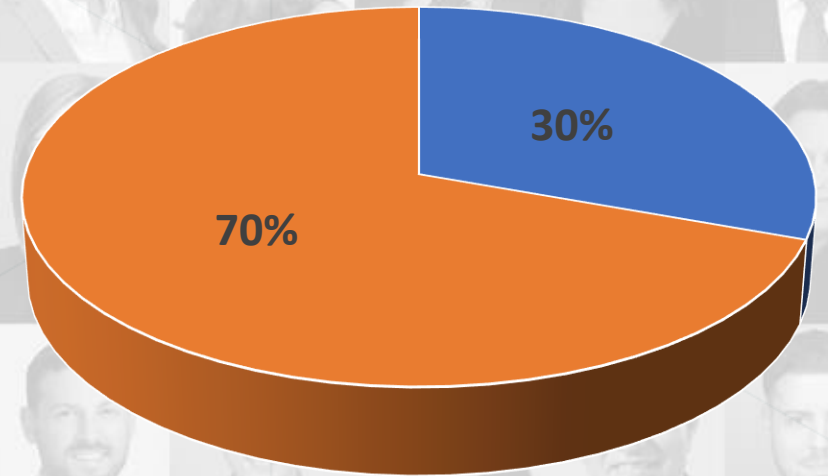
Anser's internal staff are composed of...



■ Minorities ■ Non-Minorities

At Anser Advisory, we embrace and value diversity, and foster an equitable and inclusive environment.

We are committed to engaging diverse employees and project team participants to enable a diverse and inclusive project team.



■ Female ■ Male

YOUR DEDICATED TEAM



MARGARET WOOD, AIA, MCPPO
Project Director
MSBA Feasibility Lead

36+ years of industry experience
Registerer Architect

Anser's Pre-Construction Director
and Community Engagement
Leader.

Public and MSBA engagement,
designer selection, construction
delivery decisions, Project
Funding Agreement details



BOB STEVENS, RA, MCPPO
Project Manager
Day to Day Contact

36+ years of industry experience
Registered Architect

Experienced OPM with a
background as a K12 school
designer.

Day to day contact responsible
for project administration, design
review and procurement
compliance.



MARY BULSO, CSL, MCPPO
Construction Administration Lead

33+ years of industry experience
Licensed Construction
Superintendent (CSL)

Experienced OPM leading the
Construction Administration
process and ensuring compliance
with bid documents and contract
requirements.



TOM O'NEIL, MCPPO, LEED AP
Managing Director
Anser Advisory

35+ years of industry experience

Northeast Regional Director

Expert in public construction
contracts, construction logistics
and phasing

YOUR DEDICATED TEAM



SHELLY POTTORF, RA
Principal, Architend
Net Zero Peer Review

Commitment to place-based regenerative design, resilience and sustainability through new models of practice.

Will provide input on requirements of designer RFS and review/recommendations on design documents.

Architend is a woman-owned business.



JONATHAN ABE
CEO, Sunwealth
Renewables Advisor

Committed to investing for a better energy future through financing and managing solar projects.

Previously a Project Manager with the Massachusetts Technology Collaborative Energy Trust.



PETE TIMOTHY
A.M.Fogarty
Estimator

Anser Advisory's longtime estimating partner for public school projects. Pete Timothy is involved with estimating an average of 10 public projects per month, ensuring his detailed and up to date grasp of the market for public construction in the Commonwealth.

TEAM ORGANIZATION

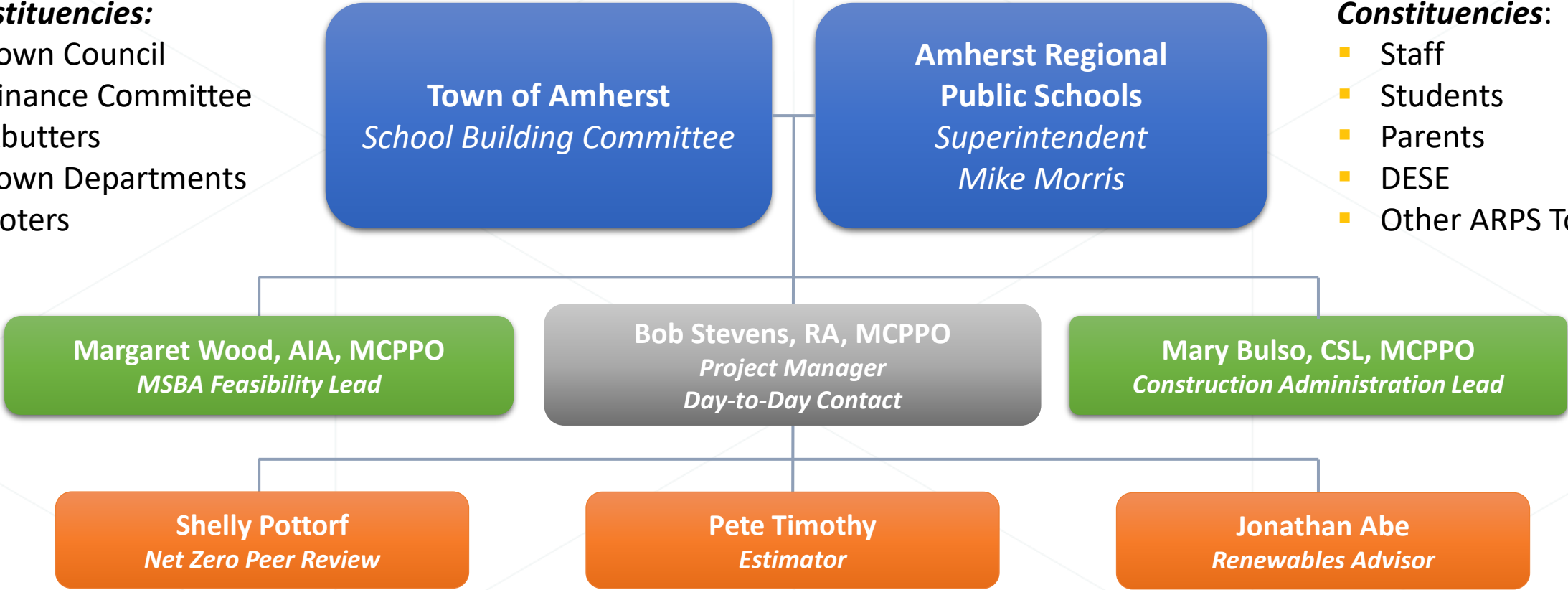


Constituencies:

- Town Council
- Finance Committee
- Abutters
- Town Departments
- Voters

Constituencies:

- Staff
- Students
- Parents
- DESE
- Other ARPS Towns



YOUR PROJECT GOALS

Right sizing enrollment

We understand that 575-600 students feels right to the community. Your options to achieve that may involve changes to ARPS's regional school agreement. We have experience with regional districts like yours and we can assist you determine the best approach.



Creating a warm, child-centered building

Parents and teachers are very concerned about what it could mean to have a single larger school. It is critical that the design of the school allow parents, students and staff to see themselves thriving. Looking broadly at precedents with community members can provide opportunities for positive public discussion and input.



Ensuring public support

The project will require a debt exclusion vote. The process needs to answer questions, provide transparency, and inspire support. Key areas to focus on include:

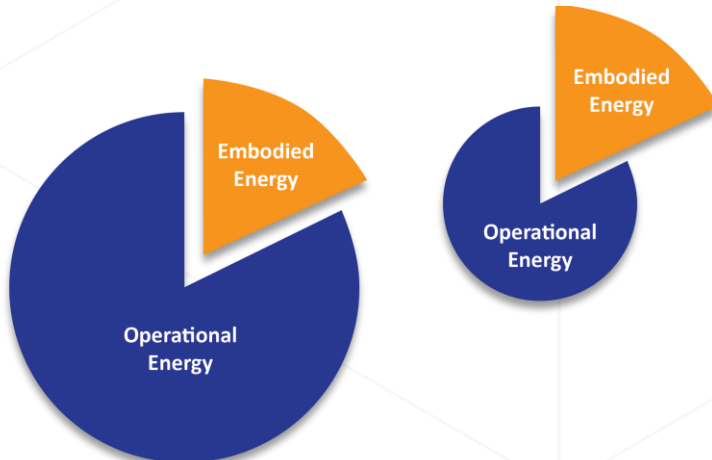
- *Improved learning environment for students and teachers*
- *Fiscal responsibility*
- *A project approach that provides equity, diversity and inclusion*



PROJECT GOALS

Designing and building a high-performance building

There are two parts to Net Zero: reducing energy usage to the lowest possible level and supplying renewable energy for the building's requirements. Members of our team have designed and built Net Zero projects and been deeply involved in the renewable energy market.



Typical Building

High-performance Building

Building on an occupied site

Safety, safety, safety: that is the mantra with any school, but no more than with an occupied elementary school. We have an experienced team that has renovated, demolished and built schools right next to schools in operation. The key is phasing that take advantage of the school year, and tight control of all activities that have associated safety concerns.



Budget and schedule

Deliver the project on time and on budget: that is our OTHER mantra. The project schedule should be optimized for school year occupancy and be tightly coordinated with school operations. The project budget should reflect the best value choices for materials and systems and include contingencies to provide a buffer against the unforeseen.



WHY ANSER?

- ✓ We have an **experienced team** of seasoned professionals to help you select and manage the right team, to establish and maintain budget and to execute the project safely and on time.
- ✓ We excel at **making public presentations** that explain complex issues, inspire confidence and provide transparency and context for voters.
- ✓ We have demonstrated **success with logistically challenging projects on occupied sites**.
- ✓ We have a team assembled for this project to ensure you achieve **Net Zero capable AND Net Zero operational**.
- ✓ We have a firm-wide commitment to **ensuring diverse teams** at every level of the project, including compliance with the Town's wage theft bylaws.
- ✓ We believe in and are committed to the **critical role of public schools** in forming the "commons" of our educational system.

ELEMENTARY SCHOOL EXPERIENCE

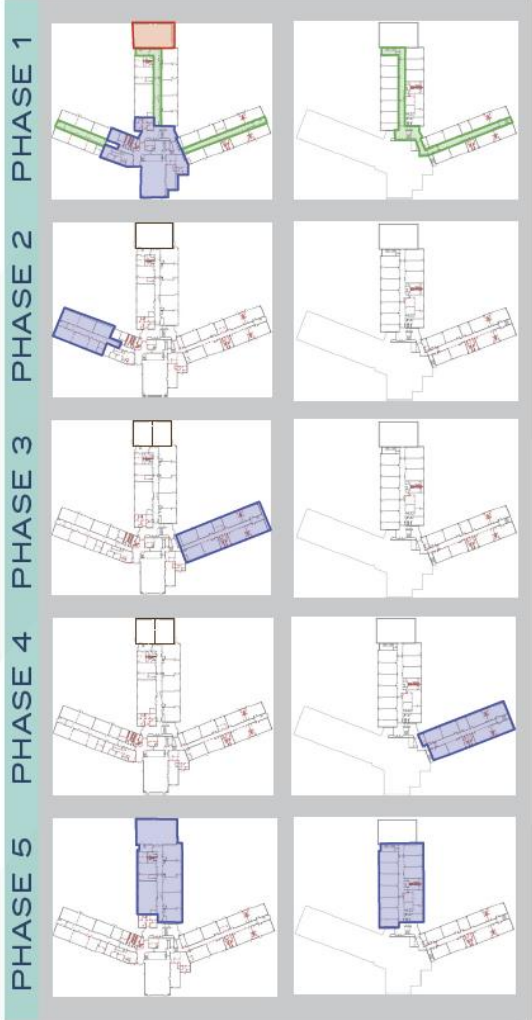
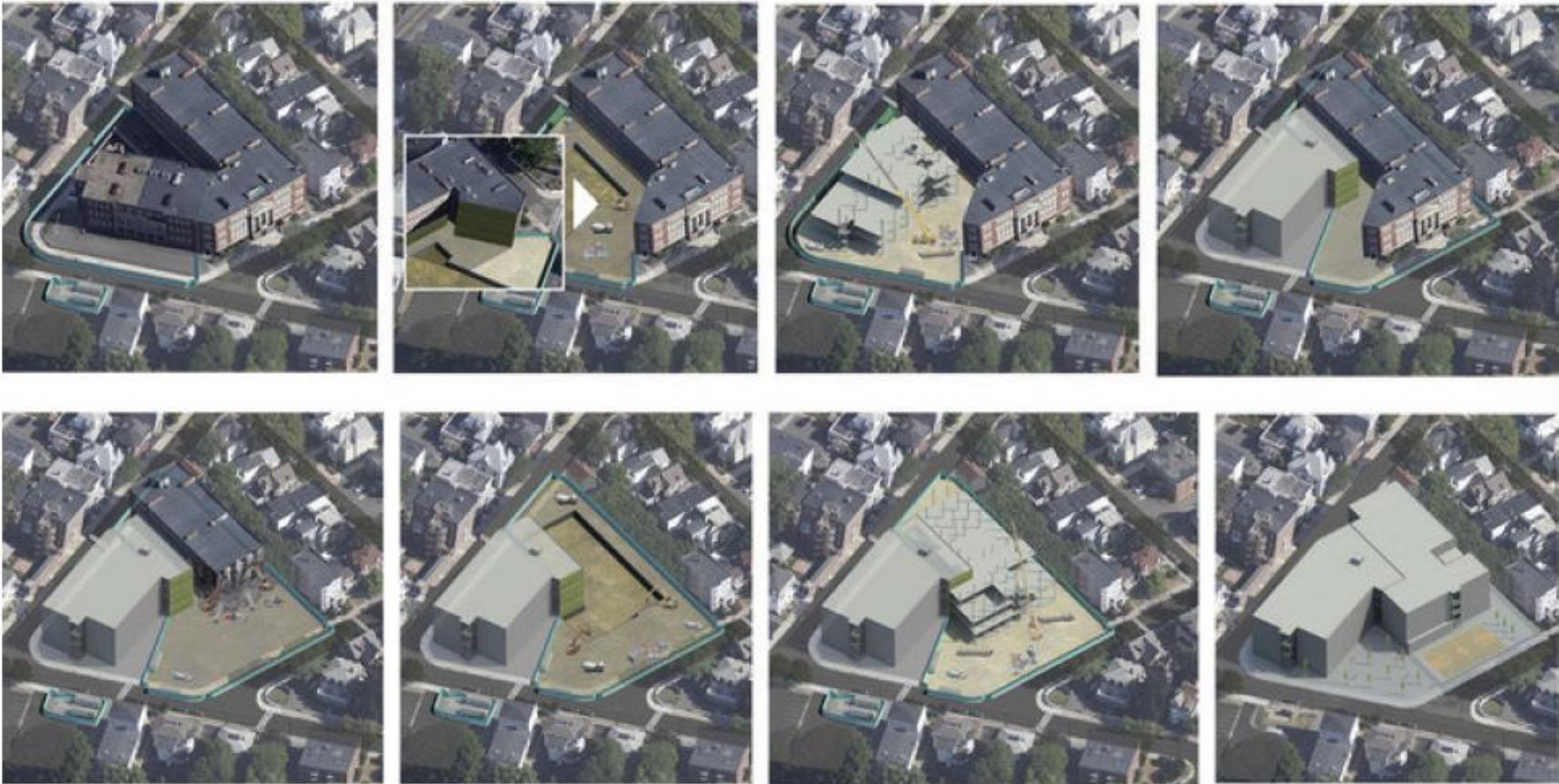
Our team's elementary school experience includes:

- Pine Grove Elementary School
(Margaret)
- South Grafton Elementary School
(Bob)
- Burgess Elementary School
(Mary)
- The Monarch School
(Shelly)



CLARK AVENUE MIDDLE SCHOOL

Similar Challenges:
Phased construction and demolition on an occupied site



NET-ZERO PROCESS

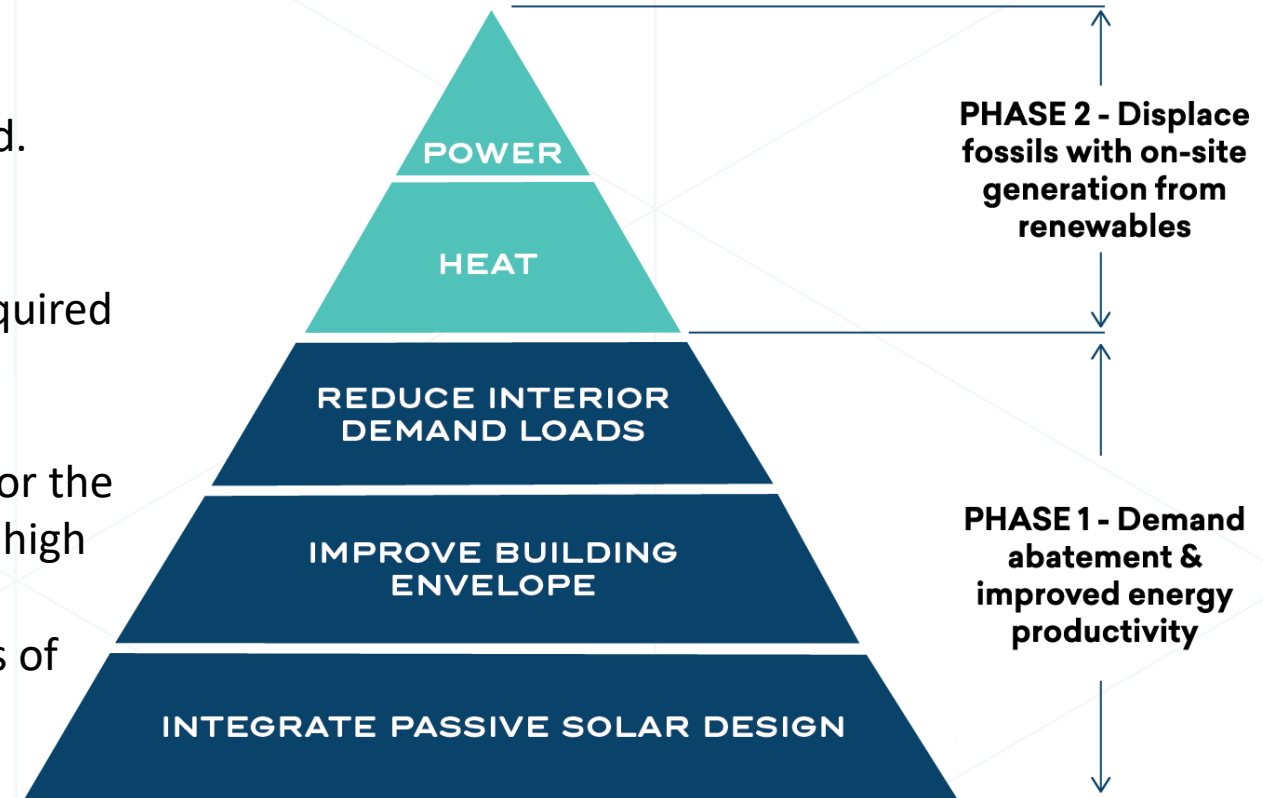
Net Zero Design Process

1. Optimize building shape and orientation.
2. Optimize building envelope.
3. Optimize building systems.
4. Add renewable system to meet the annual energy demand.

Determining the Most Affordable Option

1. Run a shoebox energy model and cost estimate for the required options. Optimize building shape and orientation during this phase.
2. Determine 3 levels of performance (envelope + systems) for the preferred option: code performance, medium performance, high performance.
3. Run an energy model and cost estimate of the three levels of performance.
4. Choose the option with the lowest construction cost.*

** Note that since the building will be net zero in all cases, operational energy costs are equal. We recommend, however, that varying maintenance costs, embodied carbon, and educational opportunities be considered in the selection of the final solution.*



NET-ZERO PEER REVIEW

Net Zero Peer Review Role

- Assist in the selection of a design and construction team that has the expertise required to achieve net zero energy.
- Assist in envisioning the educational opportunities of net zero buildings as well as broader carbon reduction goals during the community engagement process.
- Review and provide feedback on the options being considered for modeling and cost estimating.
- Provide high performance peer review during the design process, such as reviewing wall section details.
- Provide guidance to the commissioning agent on key performance criteria for net zero performance.



BUILDING COMMISSIONING

SUCCESSFUL NET ZERO DEPENDS ON QUALITY COMMISSIONING

- **The Commissioning Agent will be assigned by the MSBA after the funding agreement is executed.**
- Detailed Document review occurs at each phase of the design development by the both the OPM team and the Commissioning Agent.
- Review comments are discussed and incorporated into the contract documents.
- The Commissioning Agent is involved during the construction through regular site visits.
- The Commissioning Agent sets the agenda for and participated in the Operational Training process.



ENGAGING THE COMMUNITY

Participants have been positive about:

- The prospect of an improved learning environment for students and teachers
- The fiscally responsible qualities of the proposed approach
- The opportunity to create a “green” school
- The ability to address issues of diversity/inclusion
- The prospect of an approach that unifies the Town

These comments from the community should be at the heart of next steps with public engagement.



ENGAGING THE COMMUNITY

Participants have been concerned about:

- Consolidation challenges: will people lose their jobs? Will the budget for a joint school be cut later?
- How can a 600-student school be made to feel small?
- What happens if enrollment increases?
- What will transportation look like?
- Will people leave the District if the school communities are joined together?

It is critical to acknowledge and address these concerns directly.



ENGAGING THE COMMUNITY

Be inclusive!

- Make sure that all the colors and languages of the school community are represented

Techniques/Activities

- Have a brand
- Engage community supporters
- Create and monitor a Facebook page

Strategies to reach final approval

- Be concrete
- Provide a tax calculator

Specific challenges, successes or failures

- No “Hail Mary” passes: don’t change the script late in the game



ENGAGING THE COMMUNITY

Community Engagement Toolbox

Develop: Information is crucial, but what is most important?

What is the information that is most critical to share?

What are the options considered and what are the pros and cons of each?

What are the Frequently Asked Questions?

What is the cost for the project? What is the cost of doing nothing?

What are the operational savings?

What will be the estimated cost for the average household? To the average business?

What adjustments to municipal finance may be possible to offset the tax burden?

Inform: Communication is key, but how? We recommend:

Creating multiple approaches to sharing information (social media, videos, email, flyers)

Meeting early with electeds: it is critical to ensure they are well informed!

Meeting with the community: the project should begin with the development of a community engagement strategy that informs the Feasibility process.



INSIGHT FROM A PRIOR PROJECT

We have not been terminated from a project. But we have had projects end without proceeding. An example:

We worked for several years with the City of Holyoke to develop an equity-based plan for two new middle schools to be built at the same time.

Voters rejected the project based on its cost, but it set the stage for the future of Holyoke school projects to be grounded in equity.

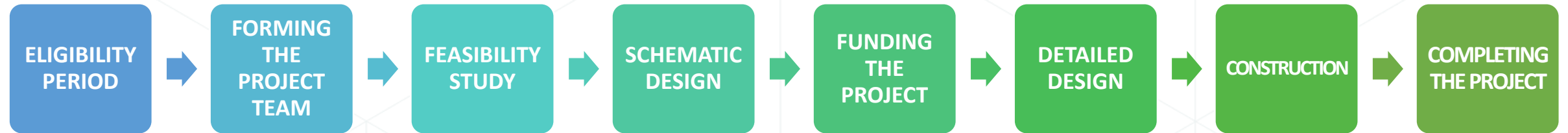
Today Holyoke is moving forward with the first of the two projects.

School projects don't terminate, they evolve and the conversation continues.

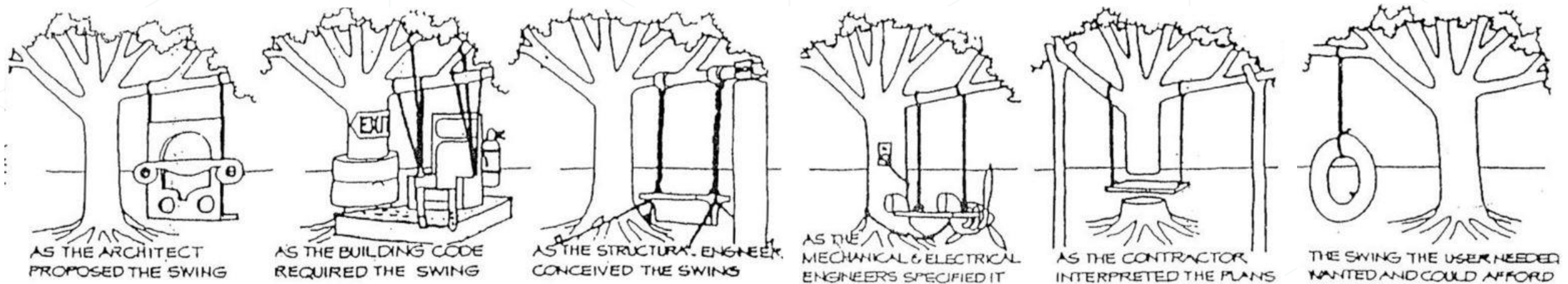


TEAM MANAGEMENT STYLE

How the MSBA structures it:



The challenge:





THANK YOU!

TOWN OF AMHERST - FORT RIVER AND WILDWOOD ELEMENTARY SCHOOLS